Customer Portal

ProWeb Edition

Updated 2025

What is Customer Portal?

TaxSlayer Pro's PaperCut Customer Portal is more than just a file-sharing tool. It's a secure, efficient, and client-friendly platform that simplifies the tax preparation process by enabling quick, organized, and safe document exchange.

Key Features:

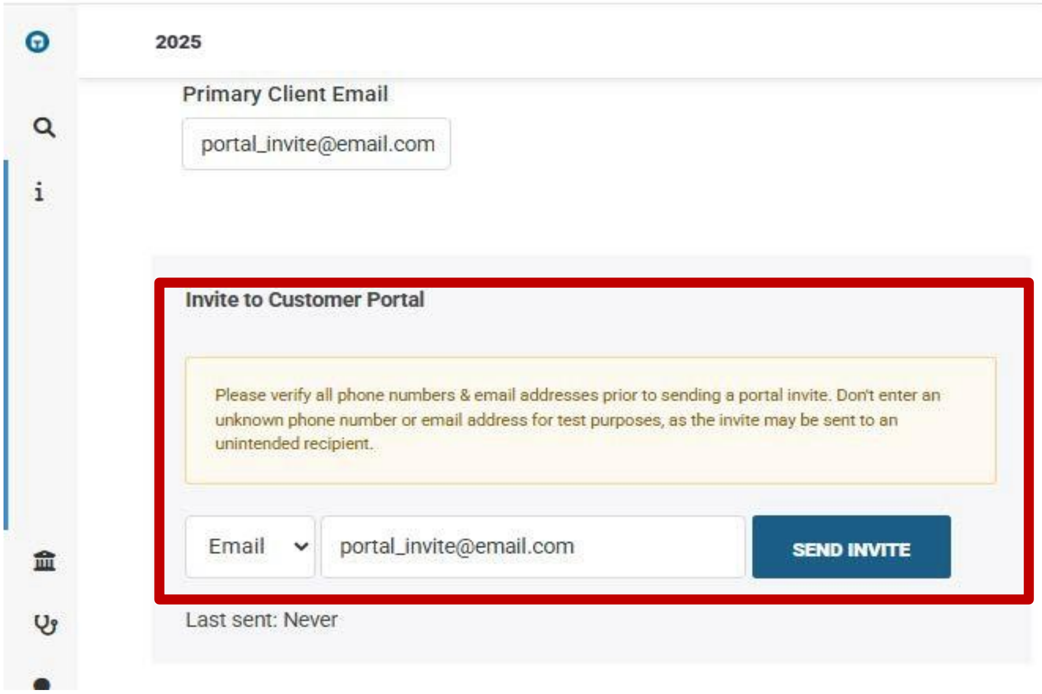
- The portal is designed with encryption and secure authentication, ensuring sensitive tax documents are protected during transfer.
- Documents can be uploaded and accessed instantly, eliminating delays from mailing or in-person drop-offs
- Clients can upload W-2s, 1099s, receipts, or other supporting files directly into the portal, while preparers can send completed returns or requests for additional information.
- The portal fosters two-way communication: clients can see what has been received, and preparers can quickly request missing items.

Creating a Customer Portal

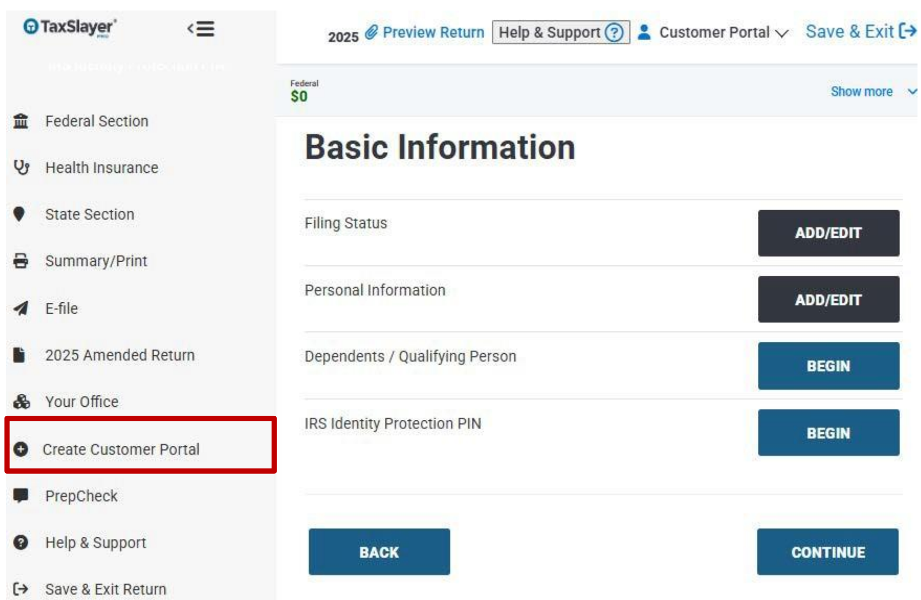
Before a portal can be generated, the client must have an active tax return created in the TaxSlayer Pro Tax Program. This ensures the portal is linked directly to the taxpayer's return, keeping all documents and communications organized under the correct file. To begin you will need:

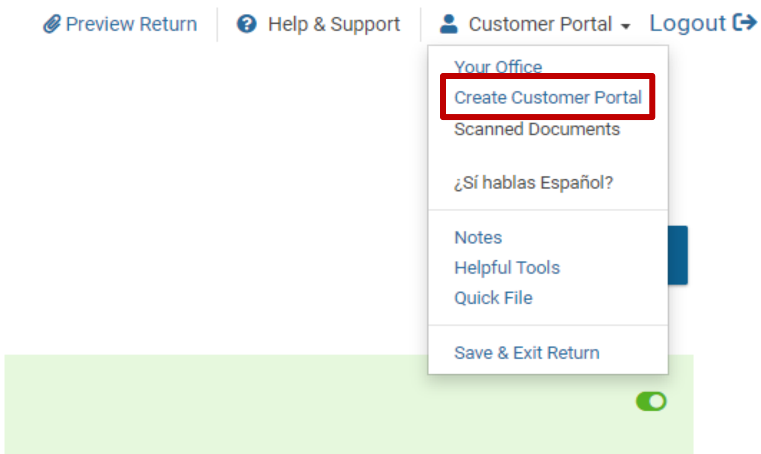
- The taxpayer's **Social Security Number** (SSN)
- The taxpayer's **mobile phone number**
- The taxpayer's **email address**

First - From the bottom of the Personal Information menu, you will see the option to send an invite to Customer Portal:

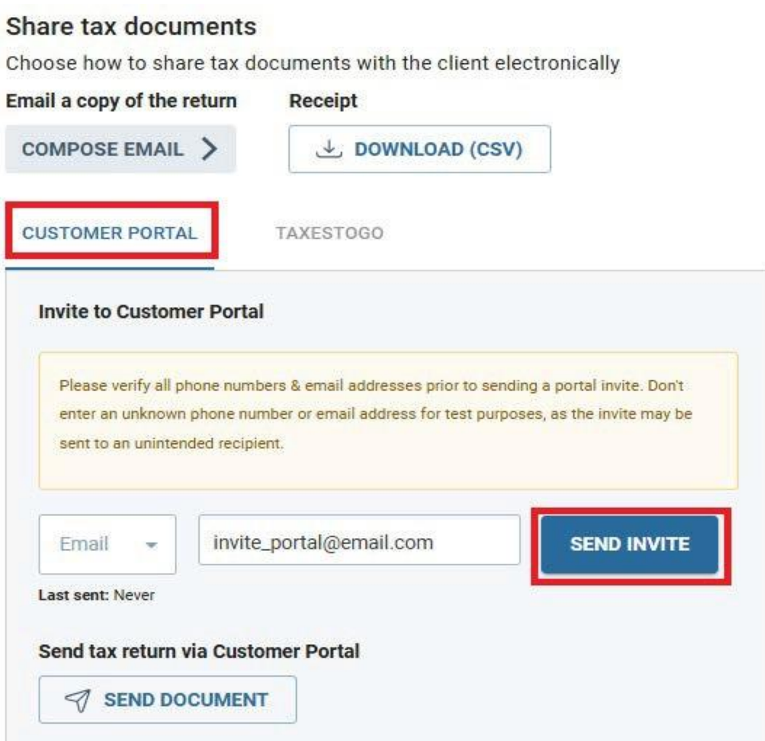


Second - From inside the return, you will see the option Customer Portal on the left-hand side of the page:



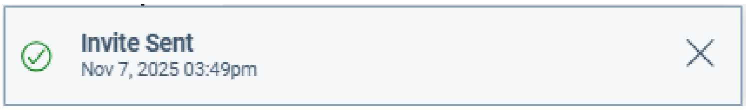


Third - You also have the choice to select the taxpayer's name drop down inside the return. The Customer Portal option will be listed above the Scanned Documents options.



Fourth - The last option is to access the Customer Portal link from the e-File / Submission page of the return.

TaxSlayer will then display the following message:



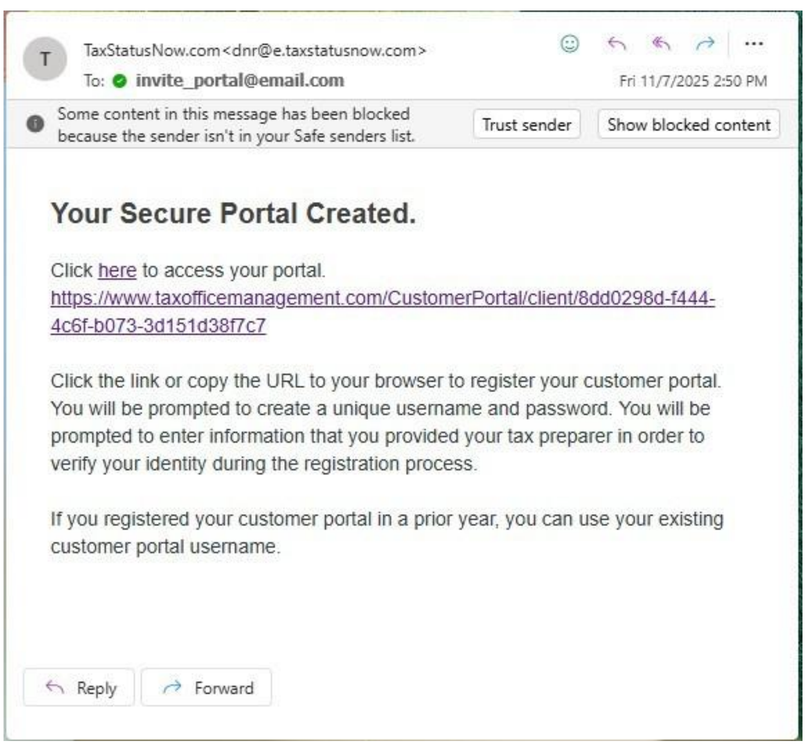
You will then want to exit out of the current Internet Tab. A link to create their portal will be sent to the taxpayer via text message or email. After the link has been established, the *Send Tax Return Docu-ments to Customer Portal* option will be visible on the e-File / Submission page. If *Send Document* is grayed out then the you the link has not been established.

Please Note: You will not be able to send documents until the portal has been created by the customer and the link has been established.

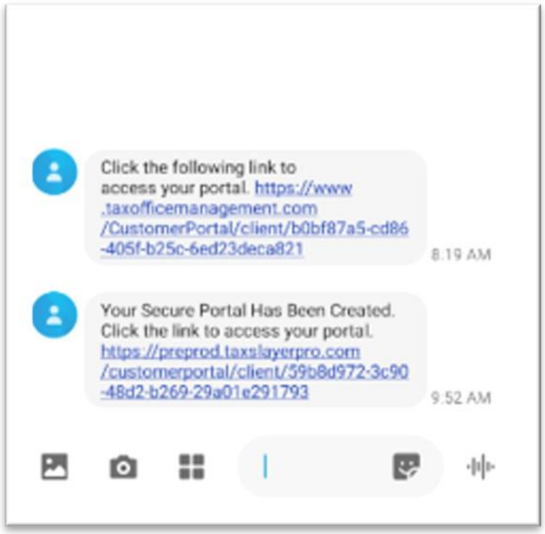
How Does My Client Access Their Portal?

Your client will access their portal either through a text message or an email, depending on if you put in a phone number or email to send the invitation.

By Email: The customer will receive an email from TaxStatusNow.com with the subject line **Your Secure Portal Has Been Created**. The email will contain a link to access their portal.

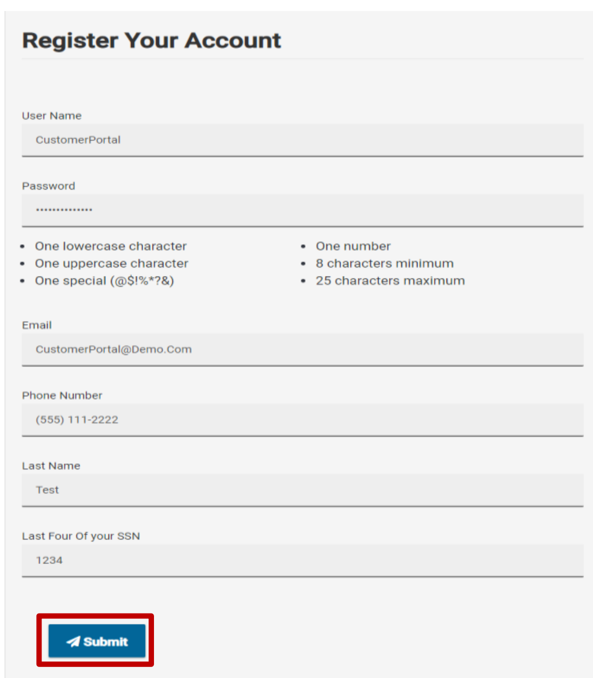


By Text Message: The customer will receive a text message for our automated system with a link to access their portal account.



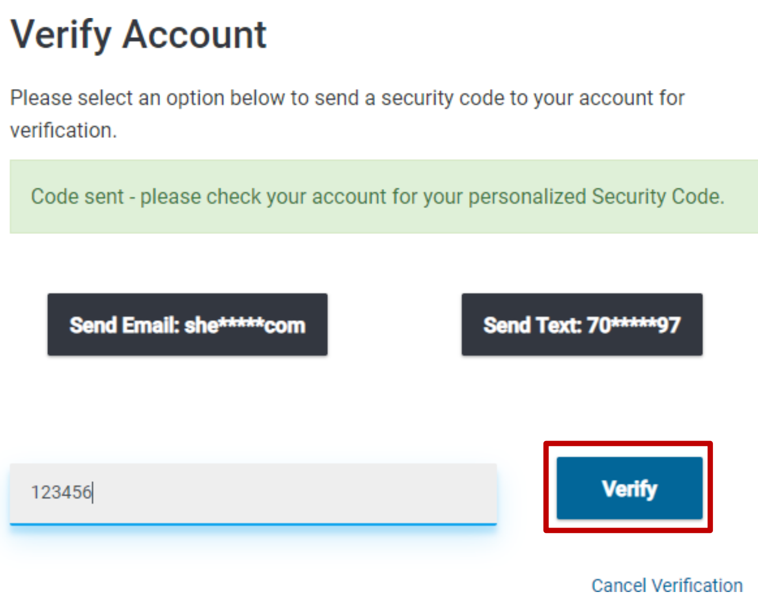
The links will prompt the customer to create their Customer Portal Account.

After the customer clicks on the link from either their email or phone, they will be guided to a page like this. They will need to pick a username, create a password, and fill out their phone, email, last name and last four of their SSN.

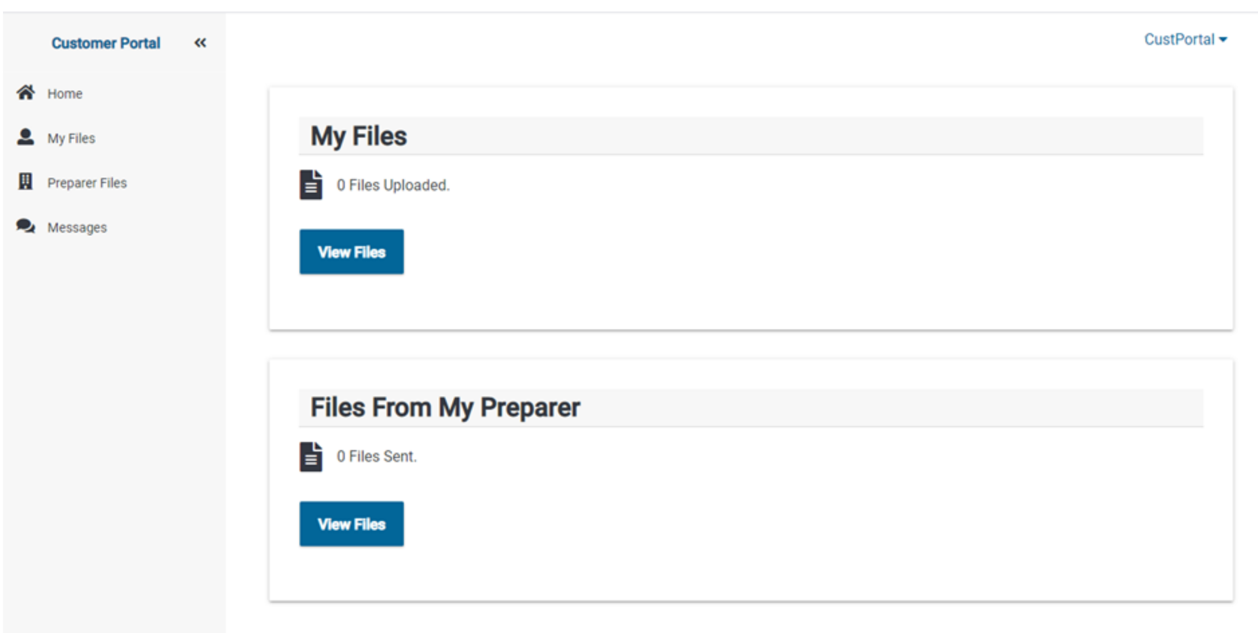


IMPORTANT! To successfully register the account, the taxpayer’s last name, SSN and mobile phone number or email address must match what you entered in their tax return.

After submitting the registration, the taxpayer will be prompted to verify their account. They can select to have a verification security code sent via email or text. When the code is received, the taxpayer will enter it in the space provided and click **Verify.**

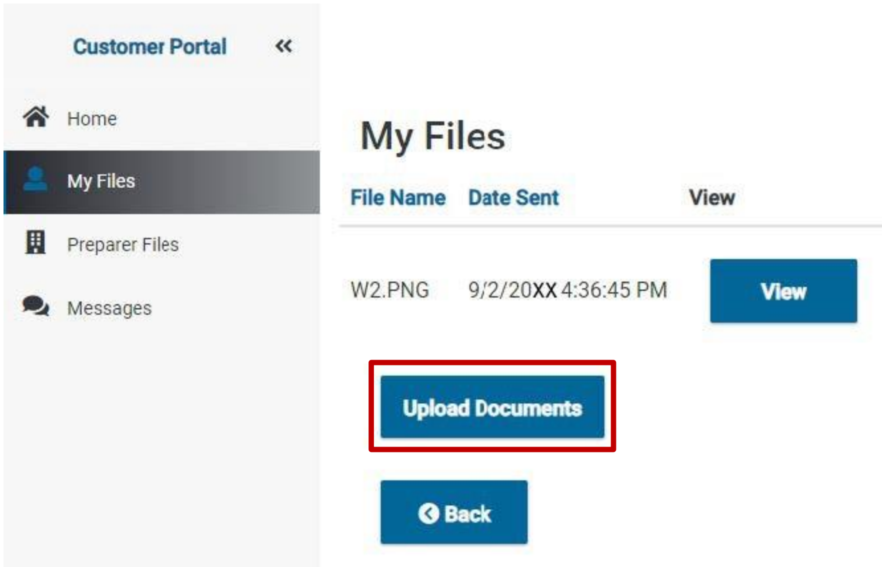


The taxpayer's portal is displayed on the screen:

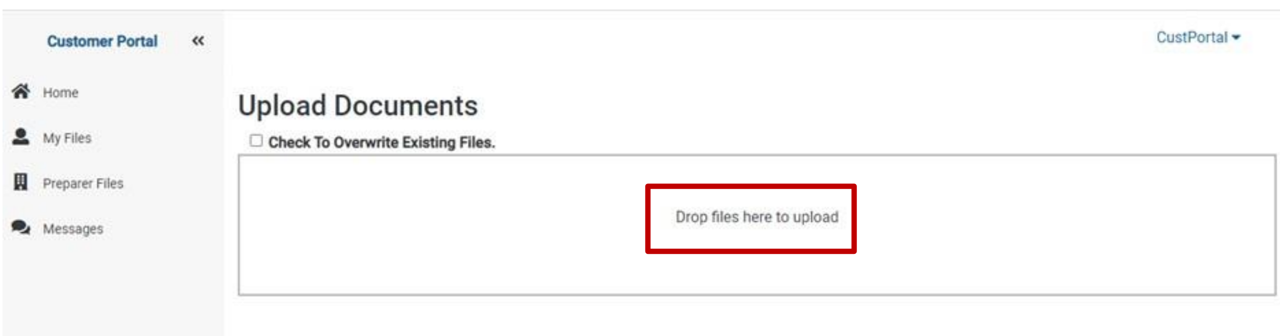


My Files:

The taxpayer can use the **My Files** area of their portal to upload documents to send to the tax preparer (W-2s, 1099s, etc.) To upload a document, click **Upload Documents**.

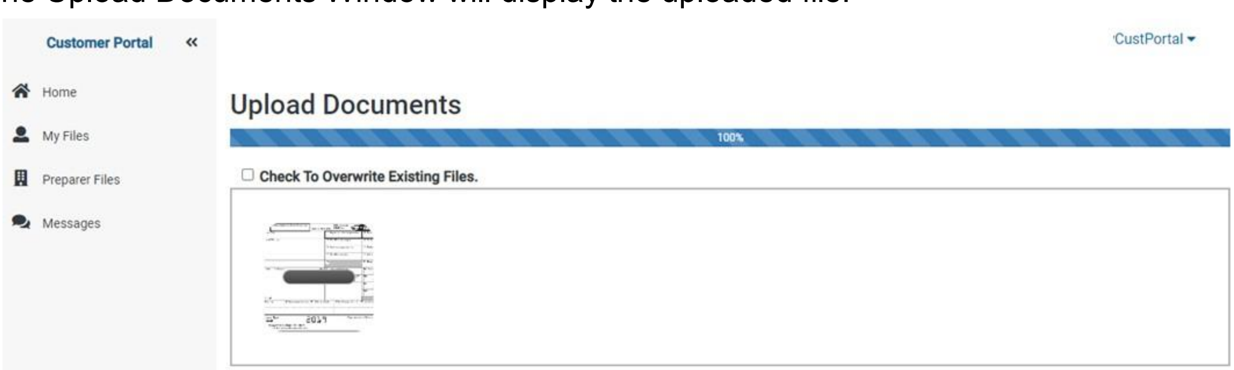


The **Upload Documents Window** is displayed on the screen:



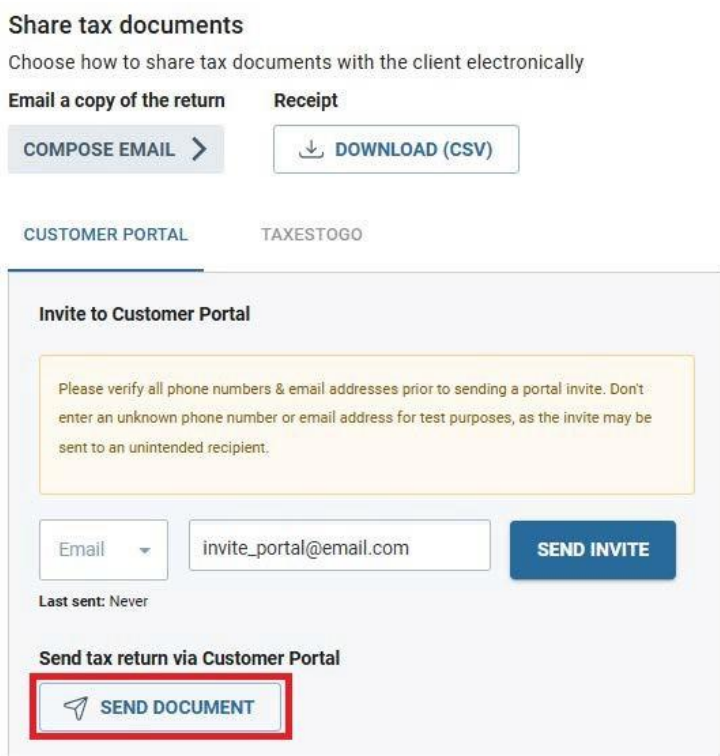
Click **Drop files here to upload** to browse and select documents to upload to the tax preparer. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload.**

The Upload Documents Window will display the uploaded file:



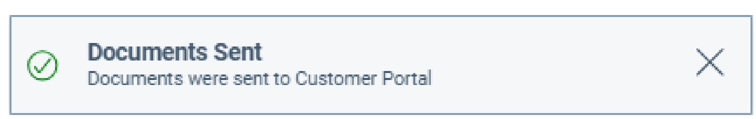
How Do I Send Documents to My Client to Sign?

To send signature documents to a customer's portal, you will click the *Send Tax Return Documents to Customer Portal* option on the Submission page of the tax return.



After sending the documents the program will give you confirmation in two ways that they have been transferred to the Customer Portal:

A pop-up in upper right corner

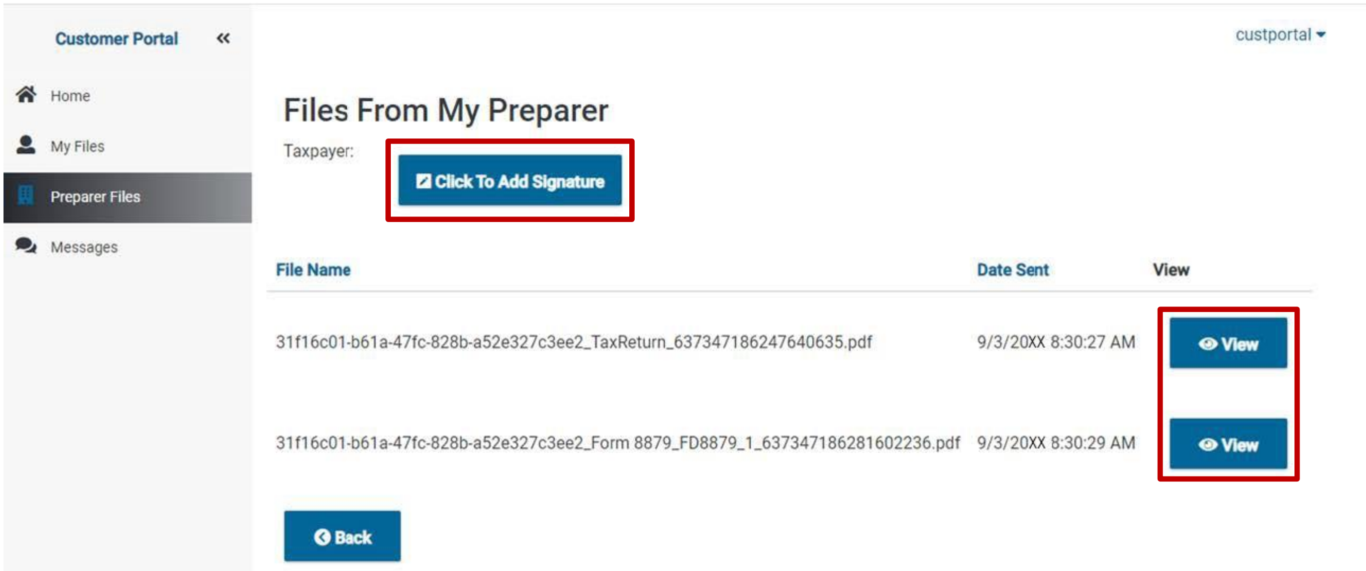


Within the 'Invite to Customer Portal' box

From here your client is ready to sign their documents in the Customer Portal!

How Does My Client Sign?

The **Files From My Preparer Window** will display the files sent from the tax preparer:



To view the documents to be signed the taxpayer will click on the **View** button **next to each document.** The document will open in a new tab in the taxpayer's browser.

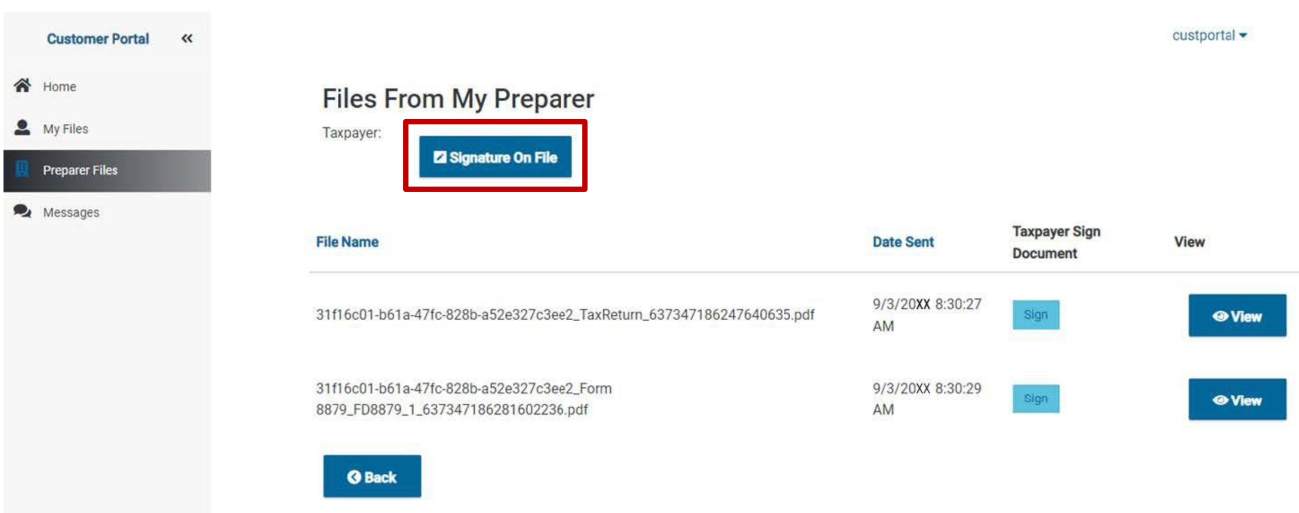
The taxpayers signature can be added even if the documents have not yet been sent.

To add their signature, the taxpayer will click on the **Click to Add Signature** button. The **Edit Signature Window** will be displayed. The taxpayer can use their mouse to enter their electronic signature from a desktop or laptop computer or use their finger to enter their electronic signature from a mobile device. To save their signature, the taxpayer will click on the **Save** button:

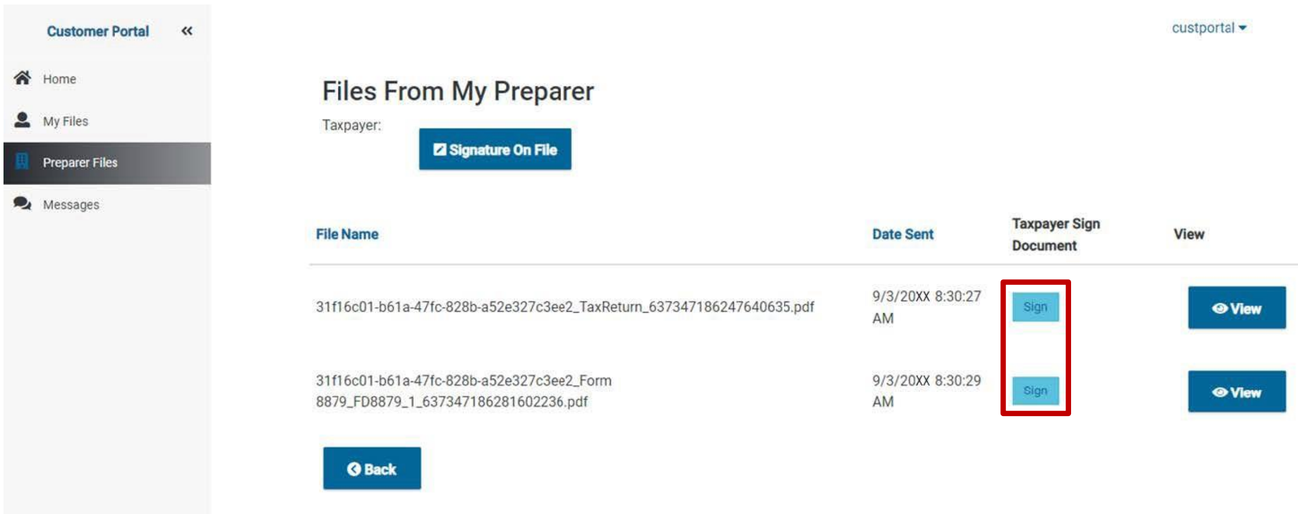
A message is displayed when the signature has successfully saved.

To apply their signature to the documents sent form their preparer, the taxpayer will click on the **Back** button:

After hitting the back button, the taxpayer will see that their signature is **On File**:



Once the signature is On File, the taxpayer will then see the ability to **Sign** their documents:



After viewing the documents, the taxpayer can click **Sign** to **apply their signature to the file**:

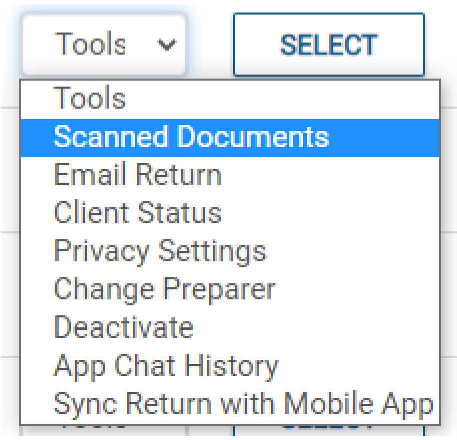
After the signatures have been applied, they will then show in the program.

Please Note: You may need to close and reopen your program to see these changes applied.

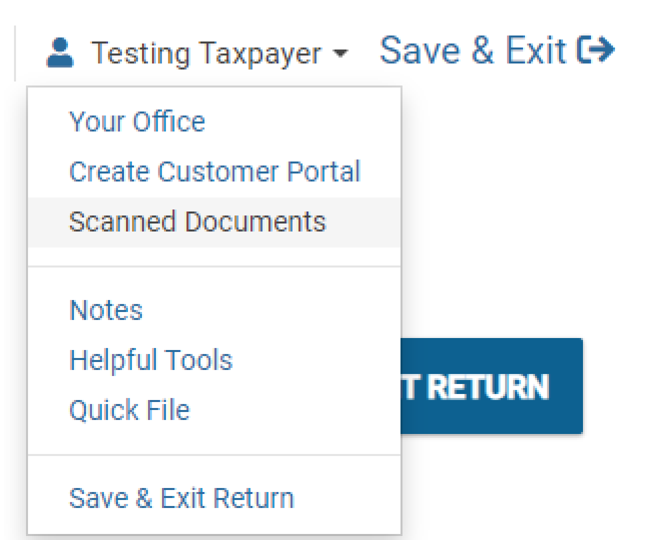
How Do I View Documents My Client Sent?

Scanned documents can be accessed in the ProWeb program from the main client list or from within a tax return.

To access previously scanned documents, or upload new scanned documents from the main client list, locate a taxpayer in the list and select **Tools > Scanned Documents**:

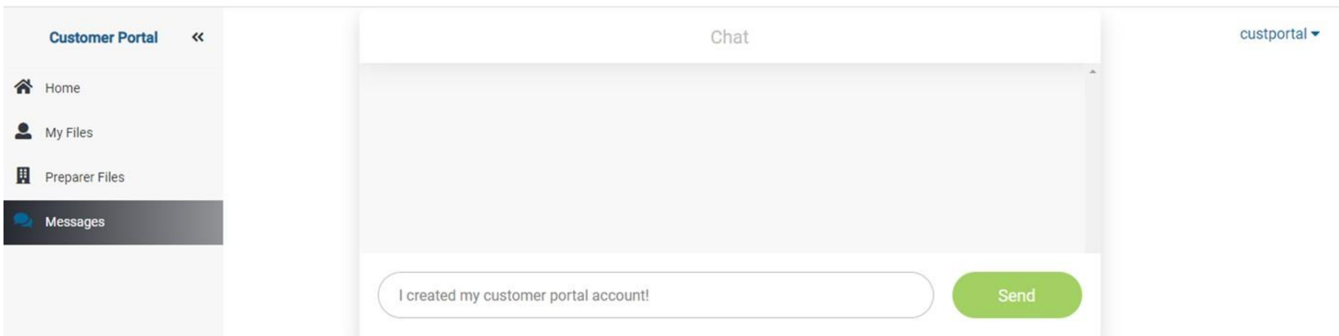


To access previously scanned documents, or upload new scanned documents from the main menu of the tax return select the dropdown menu next to the taxpayer's name at the top of the screen > **Scanned Documents:**



How can the taxpayer communicate with me?

Inside the Customer Portal is a **Chat** feature where the taxpayer and tax preparer can communicate.



When the taxpayer sends chats through this feature, you will receive the messages through the **Taxes to Go Chat feature** in the program: